ServiceCenter Job Aid

09/18/02

Georgia Technology Authority
GeorgiaNet Division

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Section 1 Job Aid – Problem Management Process

Overview

As you become aware of problems, you will be creating problem tickets in ServiceCenter in order to log and track those problems. In the event a problem occurs that you are able to resolve either immediately or while on the phone with the constituent/customer, there is no need to record the problem in ServiceCenter. If a problem is more complex and requires someone else to research and resolve it, you will create a problem ticket and assign it to the correct individual using the Problem Management module of ServiceCenter.

1.1 Logging in to ServiceCenter

How to log in to ServiceCenter

When you double-click on the *ServiceCenter Production 3.0* icon, you will be presented with a screen prompting you to enter your user name and password. The **Name** and **Password** fields are *case sensitive* and must be entered in *lower case*. Follow the steps listed in the table below to log in.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Type your LAN ID in lower case in the Name field.


</td></tr>
<tr><td>2</td><td>Type your password in lower case in the Password field.

NOTE: If you are logging in to ServiceCenter for the first time, your password will be the password provided to you by the ServiceCenter System Administrator via email. After logging in the first time, you will be prompted by ServiceCenter to change your password (as it will do every 30 days). If you are unable to log in or if you have trouble changing your password, call or email the GTA Desktop Support at 404-657-4646.</td></tr>
</table>

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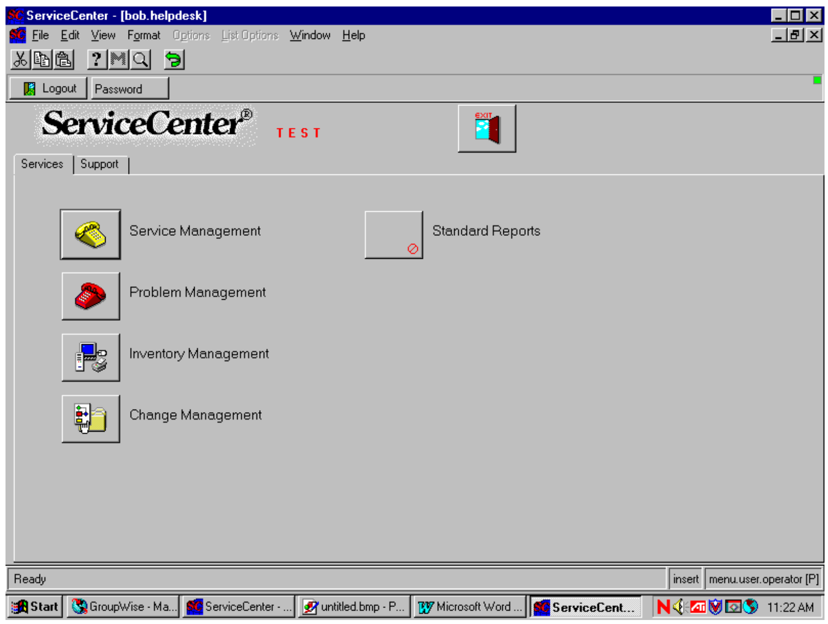
How to log in to ServiceCenter (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on the green check mark button or press Enter.

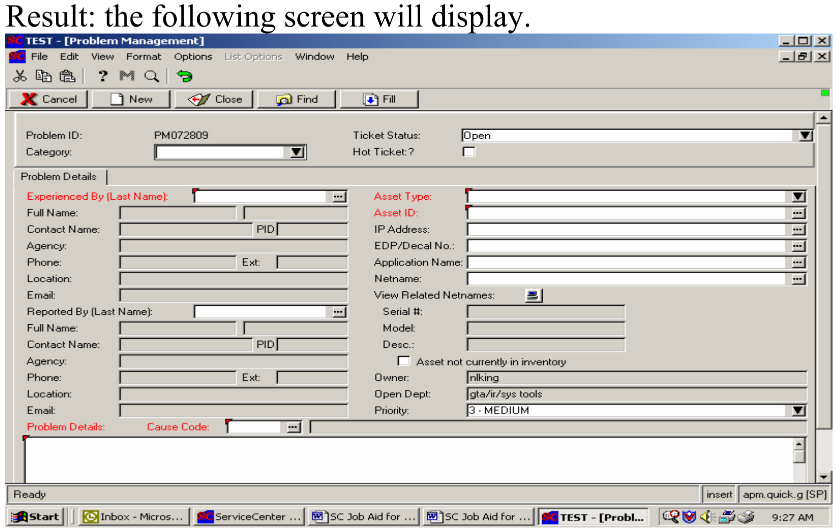
Result: The ServiceCenter Home Menu is displayed.


</td></tr>
</table>

1.2 Opening a Problem Ticket

Opening a problem ticket

Sometimes, you will be confronted with problems that *cannot* be solved right away. In these cases, you will need to open a problem ticket and assign it to the group that is responsible for fixing the problem. You will need to enter the first & second screen for the problem ticket, and then if additional data is needed, you will need to use the *category-specific form*, which varies slightly depending on the category selected. The block entitled *Completing the category-specific problem ticket form* explains how to do the latter.

Step	Action
1	From the ServiceCenter Home Menu, select **Problem Management** Icon. When the Problem Management Menu is displayed, select **Open New Problem**.  Result: the following screen will display.  Enter the mandatory fields (red labels) and any other optional information that pertains to the problem (see next page).

Open New Problem

Continued on next page

Opening a problem ticket **(continued)**

Step	Action		
2	Enter the following information as indicated in the table below. The required fields must be entered and the default information is listed below.		
	Field Name	**Required/ Optional**	**Entry/Action**
	Category	Required	Select "**Application**" from drop down list
	Status	Required	Accept default "**Open**". The system will default a new problem ticket to the status of Open.
	Hot Ticket?	Do not use this field	Clicking here will send an email every 15 minutes to management.
	Experienced By	Required	**For Portal problems** - Enter "**Portal**" and click ellipsis and the information will be auto-filled. At this time, a list of inventory records will be displayed. Select the correct inventory record from the list displayed for the problem based on the description field; click OK and some of the following data will auto populate. Enter the experienced by information for **non-Portal problems**.
	Reported By	Optional	Tab past this field and the system will populate with the Experienced By information.
	Asset Type	Required	Select "**Application**" from drop down list.
	Asset Id	Required	If this data did not auto-populate or the displayed list when the experienced by was entered did not contain the inventory record, then go to the tab to the Application Name Field.
	Application Name	Optional but Required for Portal application	If this field did not auto-populate, clear the field; then click the ellipsis button to search and select the application (double click) with the problem. For General Portal problems the application name is "**GTA Enterprise Portal**".

Continued on next page

Opening a problem ticket **(continued)**

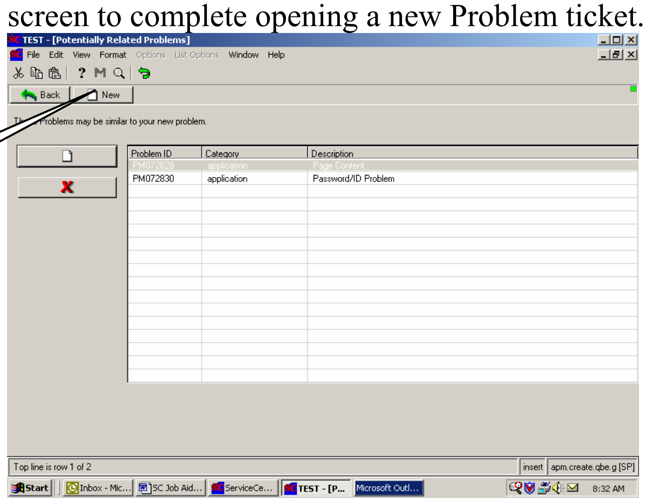
Step	Action
2	Continue entering the following information as indicated in the table below.

Field Name	Required/ Optional	Entry/Action
Priority	Required	**Defaults to Medium**. Override default if required. Check Severity code for specifics. Priority/Severity Codes: Priority Critical would be Extreme. Priority High would be High. Priority Medium would be Moderate. Priority Low would be Low. Refer to Severity on page 12 for definitions.
Cause Code	Required	- Click on the ellipsis and select from one of the following Cause Codes. Some possible codes for the Portal application are: C014 Page Content C030 Invalid URL C036 Adhoc Requests C060 Printing- unable to print/Incorrect print C065 Slow Response C080 Password/Id Problem C091 Security C092 Session - Hung/locked C108 Database Error C115 Online-Abend C122 Other; (enter more information to explain the problem) - Highlight the Cause Code and Double Click on it, then the system will auto populate the Cause Code Description and Problem Details.
Problem Details	Required	This field is auto-filled when selecting the Cause Code with the Cause Code description. Collect and record sufficient information from the constituent so that Tier 2 can recreate the problem. Include a description of the problem, the URL where the problem occurred, the constituent's operating system and browser versions, if appropriate.

Continued on next page

Opening a problem ticket **(continued)**

Step	Action
3	Click on the "**New**" button and the following screen might appear showing related problems if there are related problems. If this screen appears, all of the related problems will be displayed. View by selecting any related problem from the list, and double clicking on it, to determine if your new problem is a duplicate problem. If you determine that this new problem is a duplicate, cancel out of the problem ticket you are viewing, and write down the matching Problem Ticket number. Use the ticket number to update the new matching ticket with additional problem information, if required. Then, click on the Back button and cancel the problem ticket. If this problem is not a duplicate, **Click the "New" button** again at the top of the screen to complete opening a new Problem ticket.



Click the New button

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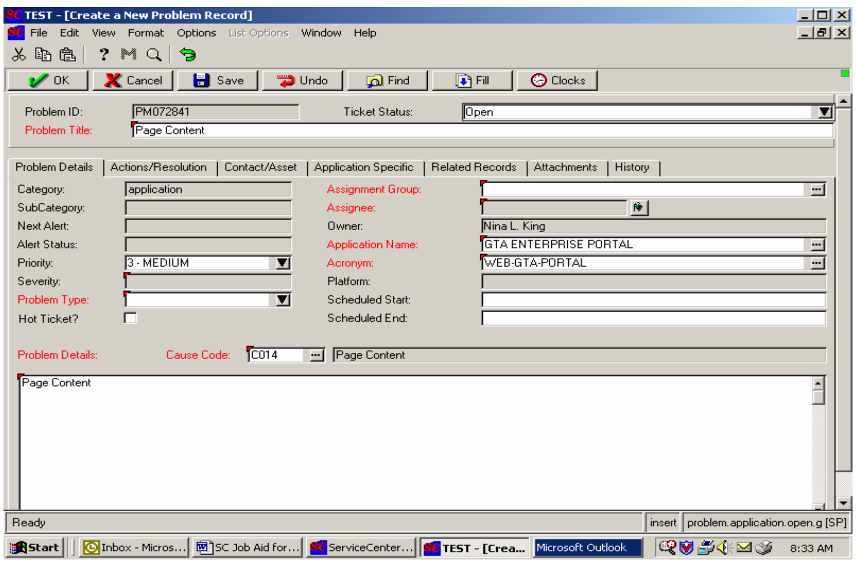
1.2 Opening a Problem Ticket, Continued

Opening a problem ticket **(continued)**

Step	Action
	Result: The Application Category Specific Problem screen will appear as displayed below:  Enter the mandatory fields (red labels) and any other optional information that pertains to the problem (see next page).

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Opening a problem ticket **(continued)**

Step	Action
4	Enter the mandatory fields for the Category Specific Problem screen.

Field Name	Required/ Optional	Entry/Action
Problem Title	Required	This field is auto-filled from Cause Code Description. The Problem Title should be a short description of the problem. Ensure that the Problem Title is descriptive enough to differentiate this problem from previously logged problems.
Problem Type	Required	Enter "Portal" for portal problems or select the appropriate type for other problems.
Assignment Group	Required	**For Portal problems:**Key "portal tier 2" and click the ellipsis button. Remember ServiceCenter is case sensitive. **For other problems**: Click the ellipsis button and select the correct assignment group.
Severity	Required	A screen will be displayed for selection of the Severity. Highlight a Severity, and double click on it. Select appropriate severity for the problem. **For Portal Problems:** "**Severity Extreme"** indicates that the entire Portal is down, that constituents get no response from URL georgia.gov. **"Severity High"** indicates that one or more of the Portal Services is unavailable, that there are data base problems or data base inaccuracies or that there are broken or missing links. "**Severity Moderate"** indicates that web content has a cosmetic error, that content information may be inaccurate or not current. **"Severity Low"** indicates that the issue is a complaint or suggestion, possibly the constituent has complained about the colors or has suggested adding additional links or content.

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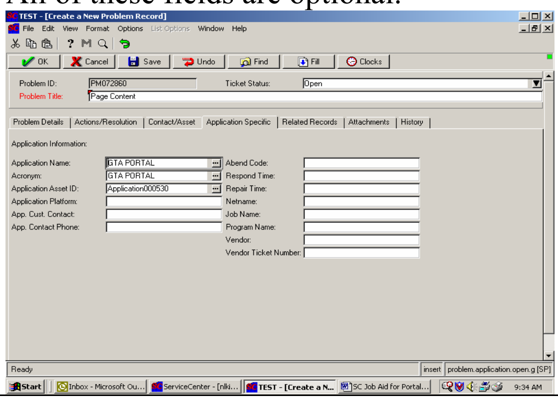
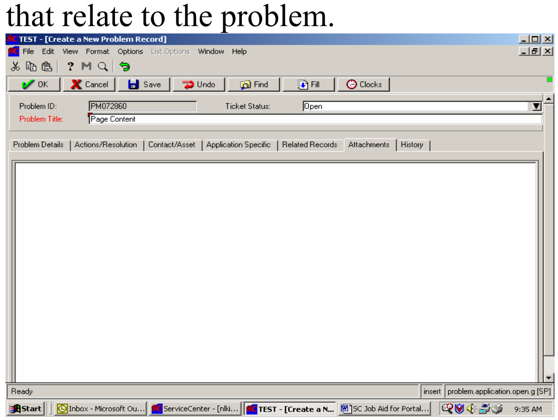
Opening a problem ticket **(continued)**

Step	Action		
4	Continue entering the mandatory fields for the Category Specific Problem screen.		
	Field Name	**Required/ Optional**	**Entry/Action**
	Assignee	Required	A default assignee will be auto populated in this field. Only override the default, if you have been given instructions to do so. To override the default, click on the ellipsis button to select a different Assignee, highlight the assignee, and double click, then the system will populate with the assignee selection.
	Application Name	Required	Auto-populated from first problem screen
	Acronym	Required	Auto-populated from first problem screen
	Scheduled Start Date	Optional	Tab past - this field is used for entering the date when starting to work on the problem.
	Scheduled End Date	Optional	Tab past - this field is used for entering the date when the problem has been completed
	Problem Details	Required	This field was populated from the first problem screen. If the Problem Details does not explain the complete problem, please collect and record sufficient information from the constituent so that Tier 2 can recreate the problem. Include a description of the problem, the URL where the problem occurred, the constituent's operating system and browser versions, if appropriate.

Continued on next page

Opening a problem ticket **(continued)**

Step	Action	
5	Enter any optional information on any of the tabs of the Application Category Specific Problem screen.	
	Tabs	**Entry/Action**
	Application Specific tab	Application specific tab has a group of optional fields that can be entered if you think this information is important to the problem. All of these fields are optional. 
	Attachments tab	Attachments tab – here is where any attachments can be added that relate to the problem.  **Right Click** in the attachment area, a pop-up window will be displayed. **Select Insert File.** Retrieve the file from your library and **Double Click** on it. Result: An Icon with the file name will now be displayed on the Attachments tab. Click on this icon to display the information.

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Opening a problem ticket **(continued)**

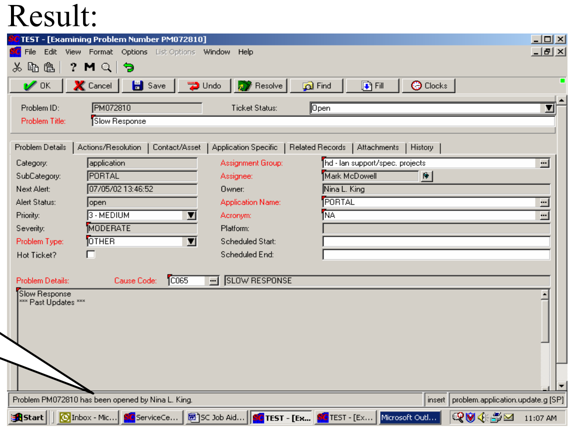
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

Click on the Save button at the top of the screen to create a Problem Ticket.

Result: ServiceCenter validates that all required data has been entered and that the format of all data is correct. Then, if errors are detected, the record is not created, but an error message is displayed on the bottom of the screen on the **Status Bar**.
If the record is free of errors:

- the record is saved as an open problem ticket
- a message stating *PM999999 has been opened by* Owner Name (user id of person opening the problem ticket) is displayed on the **Status Bar**
- the original description of the problem in the **Problem Details** field on the **Problem Details** tab is grayed out and any additional actions or resolutions will be shown following a line stating ***Past Updates***
- On the **Problem Details** tab, the **Next Alert** and **Alert Status** fields are filled in.
- the **Actions/Resolution** tab is opened up to allow for additional text
- the **History** tab
  - is filled out with information about the name and department of the person opening the problem ticket as well as the date and time the ticket was opened, and
  - shows alert information based on the assignment group chosen and the severity of the problem, and
- an email notification is sent to the **Assignee** to inform him/her of the assignment of a problem ticket.

Result:



Problem Ticket message

</td></tr>
</table>

1.3 Searching for Problem Tickets

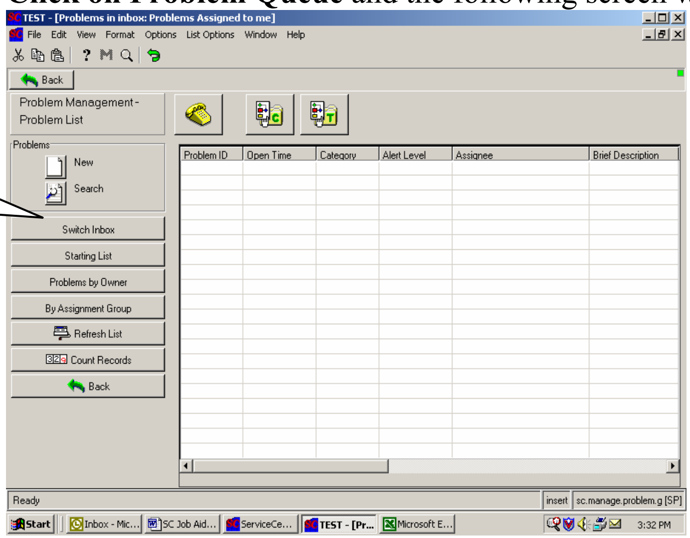
Searching for problem tickets
1. By Problem Queue
2. By Problem Management Ticket

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

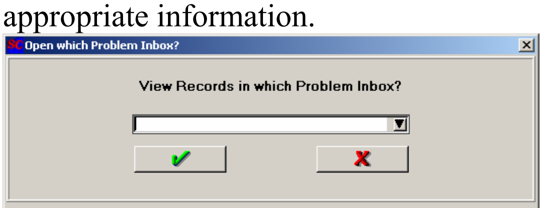
Search – By Problem Queue

On the ServiceCenter Home Screen, Click on Problem Management
Click on Problem Queue and the following screen will appear:

Click on Switch Inbox



The system will display problem tickets by a preset inbox. Click on **Switch Inbox** and the following window will pop up. **Click on the arrow** and make a selection. Then, **Click on the checkmark** and your inbox will be switched to display the appropriate information.



Switch inbox to one of the following:

- List by hot tickets
- Open problems that I opened
- Open problems my department
- Problems assigned to me
- Problems assigned to my assignment group (Portal Tier 2)

</td></tr>
</table>

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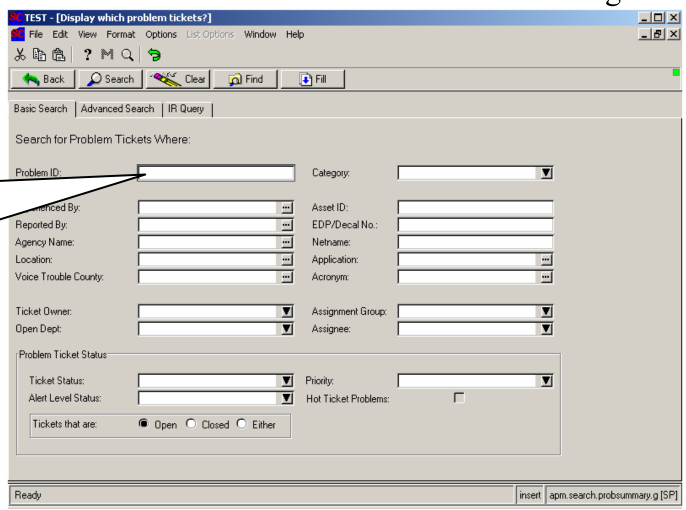
1.3 Searching for Problem Tickets, Continued

Searching for Problem Tickets (continued)

Step	Action
2	**Search PM Tickets** **Click on Problem Management** on the Home screen**.** **Click on Search PM Tickets** and the following screen will appear:  Enter Problem Number and the Enter key **Enter the identifying field information** that you want the search list to return. If you know the Problem Number that is the fastest search. Assignment Group, Assignee and Open Dept are all good search fields.

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1.3 Searching for Problem Tickets, Continued

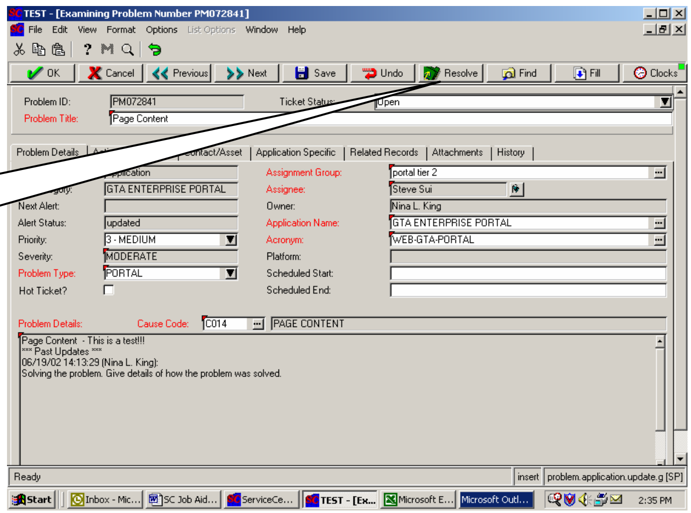
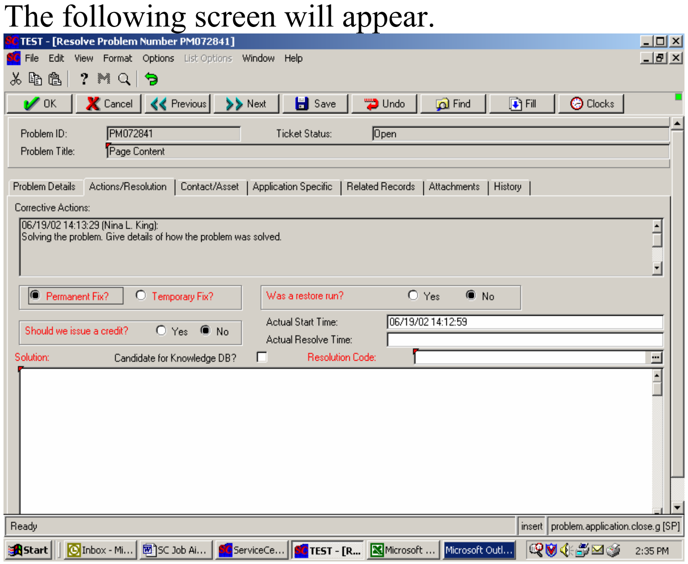
Searching for Problem Tickets (continued)

Step	Action		
3	Once you have located the problem ticket using the Problem Management Queue or Problem Management Search functionality, then **update what is needed**.		
	Tab/Field Name	**Required/ Optional**	**Entry/Action**
	Problem Details tab – **Assignment Group and Assignee field**	Required	Change Assignment Group and Assignee if the assignee or assignment group is not the correct one to work on this problem. Also, change severity if required. This does not resolve the problem but it will forward the problem to someone else to work on it.
	Actions Resolution tab- Actual Start Time	Optional	Enter the Start Date and Time.
	Actions Resolution tab- Corrective Actions box	Optional	Record the action performed to correct the problem.
	Attachment tab	Optional	Attach any related files and emails.
4	**Click on Save** to save the changes made to the Problem ticket. The system will populate the information entered in the Corrective Actions box to the Problem Details box with date and user-id of the user updating this problem ticket. If the problem has been resolved, see the section on Resolving a Problem Ticket.		

1.4 Resolving and Closing a Problem Ticket

Resolving and Closing a Problem Ticket

Note: Search and Reassign the problem to the correct assignee, if the current assignee can not resolve.

Step	Action
1	**Click on the Resolve button**.  Click on Resolve button Result: The following screen will appear. 

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Resolving and Closing a Problem Ticket (continued)

Step	Action
2	Continue entering the mandatory fields for the Category Specific Problem screen.

Field Name	Required/ Optional	Entry/Action
Actual Resolve Time	Optional	Enter Date and Time resolved. Click the fill button to automatically enter the current date and time. (MM/DD/YY format)
Resolution Code	Required	Record Resolution Codes by selecting from the drop down list. Here is a selected list of resolution codes to be used for the Portal application: ▪ R040 for no problem found ▪ R128 Browser Issues ▪ R131 Work-around developed ▪ R132 Page Content Corrected ▪ R147 Application Changes made as required ▪ R149 Data changes made as required ▪ R150 Hardware changes made as req. ▪ R154 System software change made as required ▪ R157 Other (enter more information to explain the resolution) ▪ R163 Vendor modification
Solution	Required	Solution field will be auto-filled by text for selected resolution code. Add additional information as needed to the solution field.
Candidate for Knowledge Data Base	Optional	Click a check mark in this field **only** if this resolution should go in the knowledge data base. **This field is rarely used**!
Permanent Fix or Temporary Fix	Required	Defaulted to **Permanent Fix;** change if necessary.
Was a restore run?	Required	Defaulted to **NO;** change if necessary.
Should we issue a credit?	Required	Defaulted to **NO;** change if necessary.

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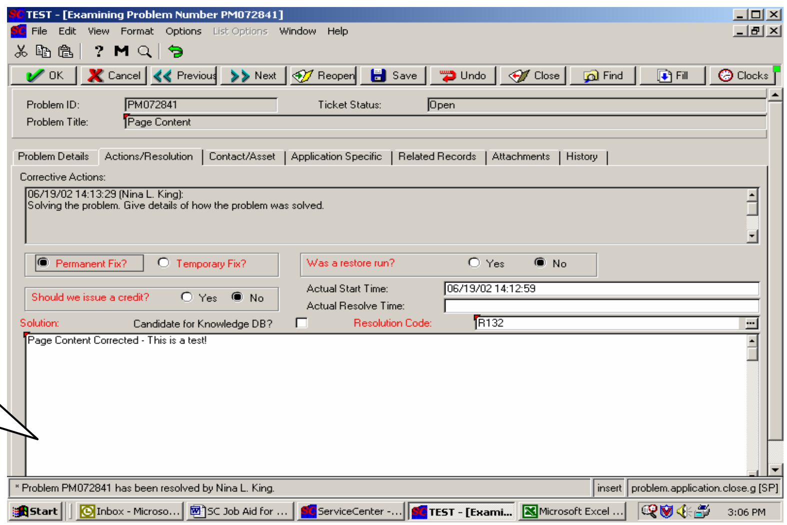
Resolving and Closing a Problem Ticket (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on the Save button and the resolution information will be saved. The Problem ticket status will change to “Resolved”. A message will be displayed at the bottom of the screen. Assignment Group can not be changed after the problem is resolved.



Message stating Problem is Resolved</td></tr>
<tr><td>4</td><td>Click on the Close button and the problem ticket will change the status to “Closed”, and clear the screen.</td></tr>
</table>

1.5 Open a Change from a Problem

If a change to an application or content needs to be accomplished to fully resolve a problem, a change record can be opened for the required change work and then the problem resolved and closed. The change can be opened from the problem. Opening the change from the problem screen will automatically associate the problem record to the change record. The problem record's resolution needs to document that the problem was resolved and closed and that the change was opened.

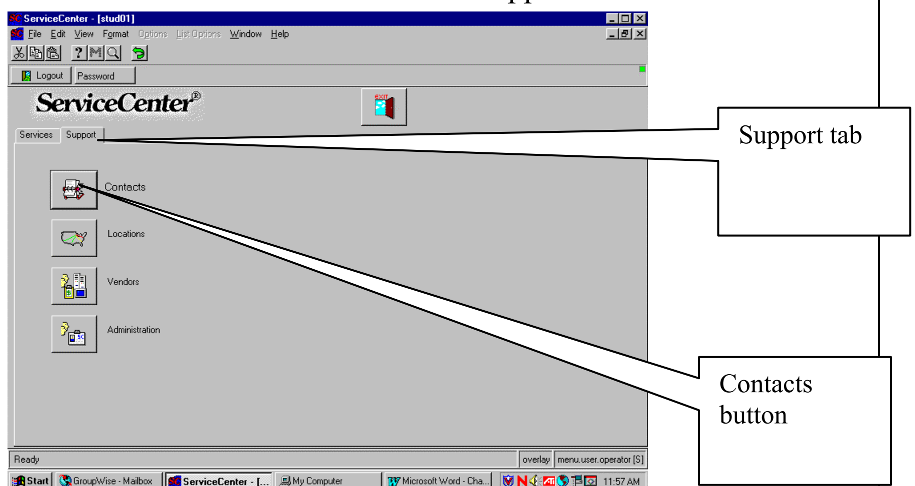
Step	Action
1	**From the problem screen, Click on Options in the menu bar, then open related CM change.** This will take you to the change module**.**
2	**Follow the instructions for Opening a Change Request.** Be sure to check and override, if necessary, the fields that ServiceCenter auto-populated from the problem. Create the fields following the field requirements for a GaNet Change**.** **(**Specifically, the Change Title field, Assignment Group, Assignee and Description)
3	**Save the Change. Click on the OK button** and Service Center will take you back to the problem.
4	**Follow the instructions for Resolving and Closing a Problem Ticket.** This will resolve and close the problem and on the problem's related records tab will be a button to link the problem to the change.

1.6 Adding a New Contact

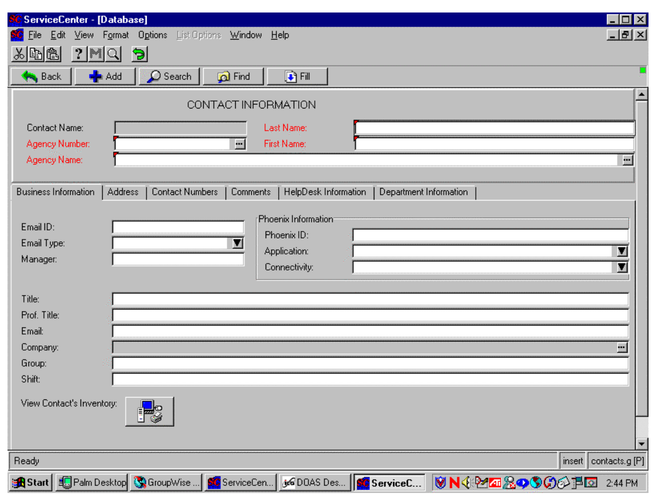
Adding a new ServiceCenter contact

If the person experiencing or reporting a problem is not listed in the QBE list of contacts, you will need to add that person's name to the contact file. Follow the instructions listed in the table below.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the ServiceCenter Home Menu, click on the Support tab. Click on the Contacts button on the Support tab.



Result: A blank contact record is displayed.



</td></tr>
<tr><td>2</td><td>Enter the last name of the new ServiceCenter contact in the Last Name field. Enter the first name in the First Name field. Both fields are required as indicated by the red field name label.</td></tr>
</table>

Continued on next page

Adding a new ServiceCenter contact (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Note that the labels for the Agency Number and Agency Name fields are red, indicating that these fields are required. These two fields work in conjunction with one another. Enter either the Agency Number or the Agency Name field as follows:

<table>
<tr><th>IF …</th><th>THEN …</th></tr>
<tr><td>the agency number is known</td><td>• enter its first few digits in the Agency Number field, and
• Click on the ellipsis button next to the field.</td></tr>
<tr><td>the agency name is known</td><td>• enter its first few characters in the Agency Name field, and
• Click on the ellipsis button next to the field.</td></tr>
<tr><td>both the agency number and name are known</td><td>use either of the methods described above.</td></tr>
</table>

Result: ServiceCenter either auto-populates the Agency Number and Agency Name fields (if there is a single agency record matching the data that was entered) or displays a list of agencies, from which you need to double-click on the correct listing in order to fill the fields.

NOTE: If the agency’s name does not appear to be in the list, cancel out of the list by clicking on the Back button at the top of the screen and re-enter the name another way. Example: If DHR or DEPARTMENT OF HUMAN RESOURCES cannot be found in the list, try looking for HUMAN RESOURCES, DEPARTMENT OF (by entering the first few characters of the name, e.g., HU.) If the agency’s name is truly not in the list, contact your manager and/or call your Help Desk to report that a new agency record needs to be created. You can use 00000 as the Agency Number which will retrieve the Agency Name AGENCY UNKNOWN until the new agency record is added to the agency file.</td></tr>
</table>

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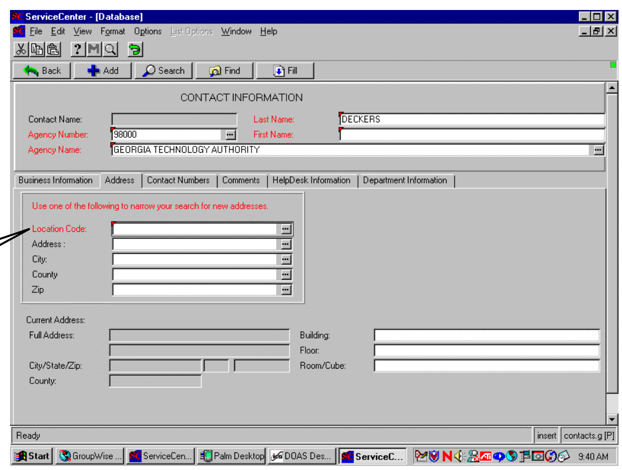
Adding a new ServiceCenter contact (continued)

Step	Action
4	Enter the first name of the contact in the **First Name** field. Note that the label for this field is red, indicating that the field is required.
5	On the **Address** tab, note that the label for the **Location Code** field is red, indicating that the field is required. Enter the first few characters of the address, city, county, or zip code in the **Address, City, County** or **Zip** fields respectively and click on the **ellipsis** button next to the field that was entered (see picture of screen below). Result: ServiceCenter either fills in the **Location Code** and the grayed out data in the **Current Address** fields (if there is only one location matching the data entered) or displays a list of addresses, from which you must double-click in order to select the desired address.  **NOTE1:** The list may be sorted, if desired, by clicking on the header of the column by which you want the list sorted. **NOTE2:** If you don't find the desired location, a location record will have to be added.
6	If desired, enter the **Building, Floor** and **Room/Cube** data, also on the **Address** tab. This data is optional.

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1.6 Adding a New Contact, Continued

Adding a new ServiceCenter contact (continued)

Step	Action
7	Enter the contact's **Phone** number in the **Work** field on the **Contact Numbers** tab so that he or she may be called if necessary. Note that the label for this field is red, indicating that the field is required.
8	Enter any other known information in any or all of the tabs shown and when done, click on the **Add** button at the top of the screen to add the new contact record. As a result, provided all required data has been correctly entered, ServiceCenter: • assigns a non-editable **Contact Name** in the form of CONTACT999999 (where 999999 represents a number) to identify the new contact • auto-populates the **Entered, Entered by, Updated** and **Updated by** fields on the **Comments** tab of the contact record • adds the record to the contact file, and • displays a pop-up message indicating that the contact record has been added to the contact file.

Section 2 Job Aid - Change Management Process

Overview

GeorgiaNet uses the Change Management Module to record and track customer requests or issues/problems. Presently issues may be recorded and tracked as a problem or a change.
If an issue/problem was reported to the Portal Contact Center (usually by a constituent), it is recorded as a problem. If the issue/problem was reported by an agency customer to GaNet Traffic, it is recorded as a maintenance/support change request.
Eventually all issues will be recorded as problems, but until the processes can be built up to accommodate this, issues/problems reported to Traffic will be in change management and issues/problems reported to the Portal Contact will be in problem management.

Changes are opened by:

- GaNet Traffic for maintenance/support requests,
- e-development managers who open some changes exclusively for tracking on-going production support activities, and
- GaNet individuals who open changes from problems.

Those changes opened by e-development managers can be identified by the change title. The change title should be – Agency Acronym – On-going & Descriptive Title and the requested implementation date should be the last day of the fiscal year. Changes opened by individuals resolving problems are assigned to Traffic, for Traffic to obtain the customer's approval prior to work starting on the change.

Change Types: Changes are classified by change type. GaNet uses the following change types: Maintenance/support, work order (under 80 hours), consulting service, project, and enterprise content. An additional change type data sales was created for GaNet and will be used when GaNet implements the tracking of data sales in ServiceCenter.

2.1 Opening a Change Request

Introduction

Changes created from problems are opened by the individual resolving and closing the problem. Those changes must be approved by the customer prior to work starting on them. Except for change type "Enterprise Content", when a change is created from a problem, it is assigned to Traffic so that Traffic will obtain customer approval before work on the change starts. In the case of "Enterprise Content" the GaNet Creative Director approves all changes to enterprise content. Changes requested or approved by the customer are accomplished by going through the appropriate workflow for the change type.

This section gives the instructions for opening the change request.

Procedure

The table below shows the steps GaNet must follow in order to create a new change request and do the initial processing.

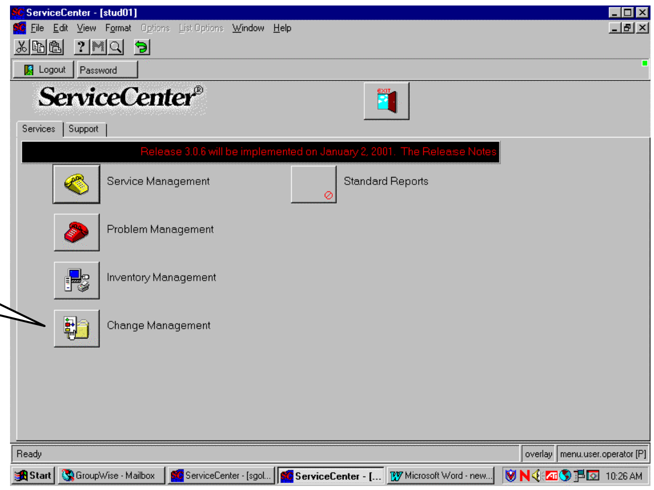
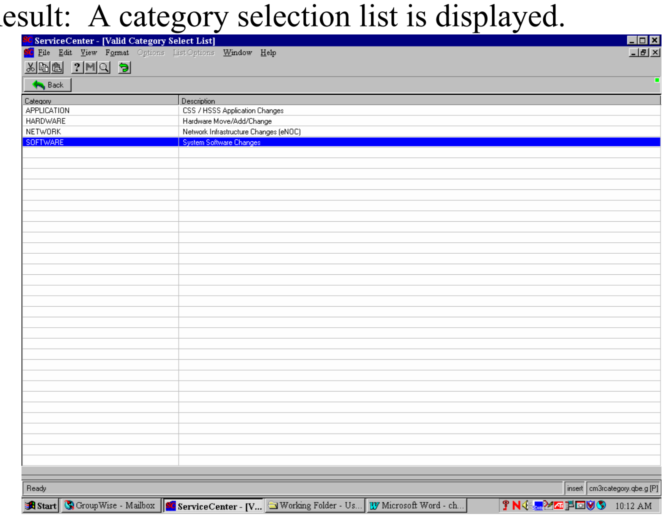
Step	Action
1	Analyze the request to identify what type of request it is and determine if the request has the appropriate approvals. **Maintenance/support service requests** for existing web sites or applications are for: • Content changes, • Graphic changes, or • Production fixes. **Work orders service requests** are for existing web sites or applications: • Minor program changes and new functionality to existing applications where the effort is estimated to be less than 80 hours. Requests for new web sites and new applications are project requests. Requests are classified as a project type requests when the new functionality to existing applications is over the threshold for a work order (80 hours). **Consulting Service** requests are requests to produce distinct development life cycles deliverables that do not constitute a full development project. **Project requests** are requests new functionality to an existing application if the work effort is greater than the 80 hour threshold set for work orders, or for new web sites or new applications.

Continued on next page

2.1 Opening a Change Request, Continued

Procedure (continued)

Change Management button

Step	Action
2	From the ServiceCenter Home Menu, click on the **Change Management** button.  Result: The Change Management Menu is displayed.
3	From the Change Management Menu, click on the **Open New Change** button. Result: A category selection list is displayed. 

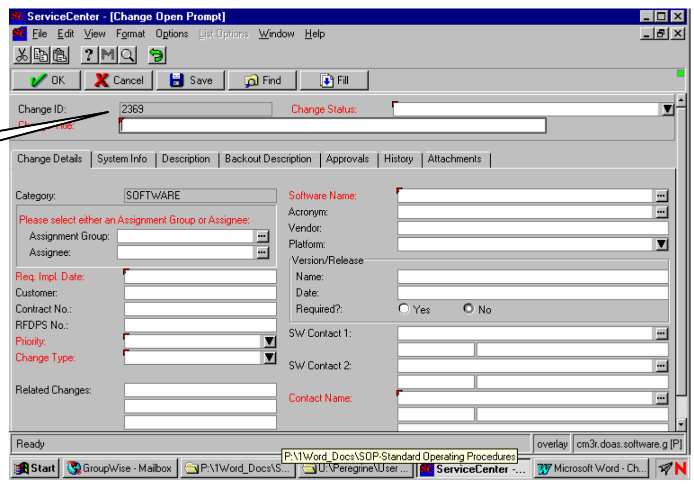
Continued on next page

Procedure (continued)

Change ID

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Double-click on the SOFTWARE category.

Result: The Change Details tab of a blank change request form is displayed (see below). Note that the Change ID field has been assigned automatically by ServiceCenter. The Category field has been auto-populated based on the category chosen, i.e., SOFTWARE.


</td></tr>
<tr><td>5</td><td>Enter the fields of the Change Details tab as described in the table below:

<table>
<tr><th>Field Name</th><th>Action</th></tr>
<tr><td>Change Status (required)</td><td>Choose the Open status.</td></tr>
<tr><td>Change Title (required)</td><td>Short descriptive name for request. Format - Agency Acronym from the Account Manager List, and short description of change. Example: DCH – Graphic Change.</td></tr>
</table></td></tr>
</table>

Continued on next page

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5
Contd</td><td>Continue to enter the fields of the Change Details tab as described in the table below:
<table>
<tr><th>Field Name</th><th>Action</th></tr>
<tr><td>Assignment Group/ Assignee (required)</td><td>Enter the Assignment Group to be assigned this change next in the workflow. GaNet assignment groups are prefaced with “ganet”.

Then, click on the ellipsis button next to the Assignee field and double-click on the name of the person to be assigned this change in the workflow. Assign to the group’s manager if individual not known.</td></tr>
<tr><td>Req. Impl. Date (required)</td><td>Requestor supplied date by which the request needs to be completed. Field should not be changed without negotiating new date with requestor</td></tr>
<tr><td>Customer (optional)</td><td>The last name of the Account Manager.</td></tr>
<tr><td>Contract No. (optional)</td><td>N/A</td></tr>
<tr><td>RFDPS No. (optional)</td><td>Since GTA is not using RFDPS numbers at this time, this field will be used to record the Agency Request for Technology Process tracking number. This maps the ServiceCenter change to the ART Process.</td></tr>
<tr><td>Priority (required)</td><td>“Critical, high, medium, or low”. The requestor supplies priority. Production fixes have a priority of “critical” and need to be addressed as quickly as possible.</td></tr>
<tr><td>Change Type (required)</td><td>Maint/Support, Work Order, Consulting Service, Project, or Enterprise Content. In the future data sales will also be used.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Procedure (continued)

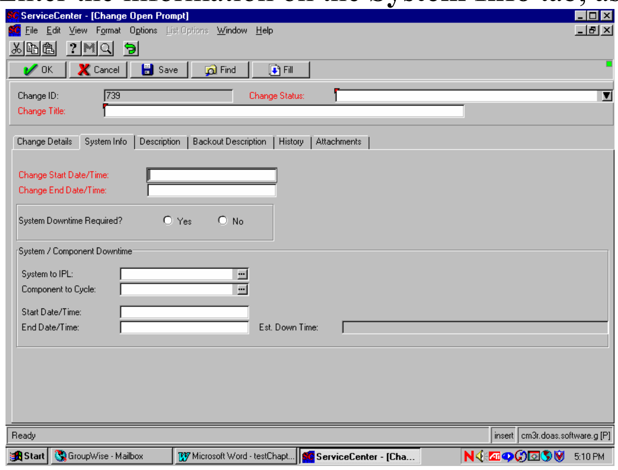
Step	Action
5 Contd	Continue to enter the fields of the **Change Details** tab as described in the table below: <table><tr><th>Field Name</th><th>Action</th></tr><tr><td>**Acronym or Software Name (required)**</td><td>Search the application inventory database by keying, in the acronym field, "WEB – Agency Acronym" and then clicking the ellipsis button. Then from the list returned, select the correct application entry by double clicking on it in the application list. If nothing in the database matches the application to be changed contact the GaNet ServiceCenter Application Inventory Coordinator. The GaNet ServiceCenter Application Inventory Coordinator can assist in locating the correct entry or can update the asset inventory with the correct application/software name.</td></tr><tr><td>**Contact Name**</td><td>Key the last name or part of the last name of the contact and click the ellipsis button. If the contact is in the database, it will return a list of possible matches or if there was only one possible match, the database contact information will be used to populate the contact information fields. If the contact is in the list, select the correct entry by double clicking on it in the list. If the contact is not in the list, click on the back button. If nothing is returned or the contact is not in the list that was returned, then the contact should be added in the database. See instructions for Adding New Contact. **Result**: ServiceCenter auto-populates the contact's last name, the first name, and the contact's phone number (if available).</td></tr></table>

Continued on next page

2.1 Opening a Change Request, Continued

Procedure (continued)

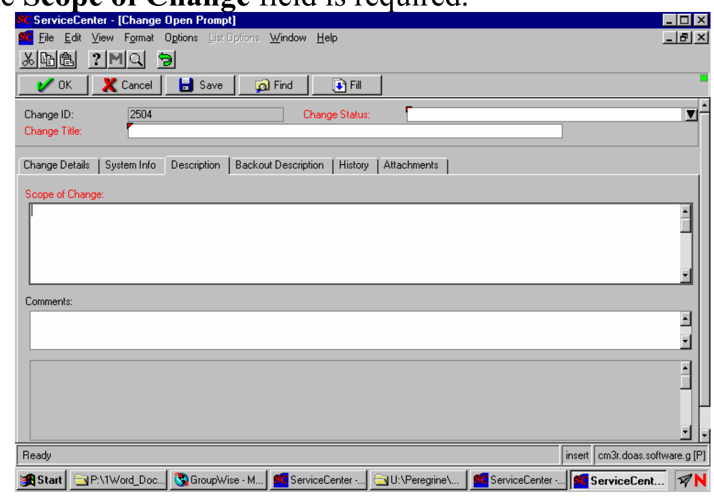
Step	Action
6	Enter the information on the **System Info** tab, as follows:



Field Name	Action
Change Start Date/Time (required)	Enter the start date in the **Change Start Date/Time** field. Note that the format of the field is mm/dd/yy.
Change End Date/Time (required)	Enter a **Change End Date/Time** that the customer requested as the implementation date. Again, the format must be mm/dd/yy.
System Downtime Required? (optional)	Not used
System to IPL (optional)	Not used
Component to Cycle (optional)	Not used
Est. Down Time (non-editable)	Not used

Continued on next page

Procedure (continued)

Step	Action
7	On the **Description** tab: Since the **scope of the change** (required) can be received electronically and/or non-electronically, capturing scope information can occur in two ways. If the scope of change information was received in electronic format it should be saved on the attachment tab or the location of the file recorded in the scope of change area on the description tab. If the requestor reported the scope of the change in a non-electronic format, the scope of change information should be keyed into this field. Any hard copy documents received regarding the request should be given to the e-developer assigned. The **Scope of Change** field is required. 
8	If desired, attach a file with additional documentation, e.g., an Excel spreadsheet or a Word document, to the **Attachments** tab of the change request (see Attaching Files to Change Requests).
9	Click on the **Save** button or press the **F4** key to save the record and leave it displayed. (Another method is to click on the **OK** button to save the record and return to the Change Management menu.) Result: Provided all required data has been entered and validation of data is successful, a message is displayed on the Status Bar indicating that Change 999 Phase SOFTWARE has been opened by username.

2.2 Updating a Change Request

Overview

GaNet staff will need to review the change requests assigned to them. After reviewing the change request, the assignee either updates it with comments and assigns it to the next assignee in the workflow or performs the work and if completed, closes the change request.

Initial review

NOTE: See Searching Change Requests for instructions on locating a specific change request.

Step	Action
1	For each change request assigned to you, review the change and perform the work to complete it.

Continued on next page

Initial review (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Update fields in the change request appropriately.

<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Assignment Group</td><td>On the Change Details tab, change the Assignment Group to the correct assignment group:
delete the existing Assignment Group
enter the correct one in the Assignment Group field by keying in “ganet” and clicking on the ellipsis button next to the field. When the list of Assignment Groups is displayed, double-click on the correct assignment group.</td></tr>
<tr><td>Assignee</td><td>Assign the change to the next appropriate assignee in the workflow</td></tr>
<tr><td>Comment Field</td><td>Log a short comment describing any activity perform for this change. The system will date, timestamp, and identify author of the comment</td></tr>
<tr><td></td><td>Click on the Save button to save the changes.</td></tr>
<tr><td>If the change is completed</td><td>Close the change as described in the section labeled Closing the Change Request.</td></tr>
</table>

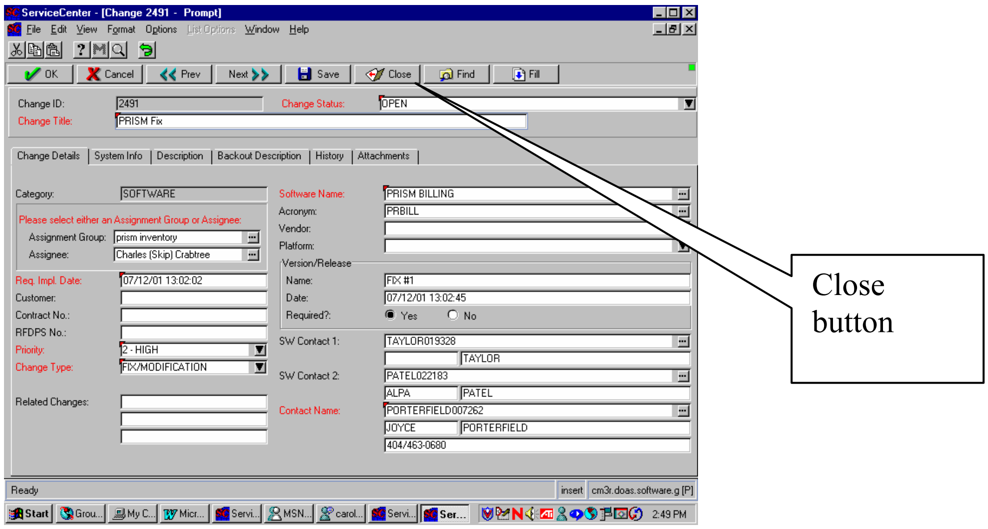
Result: If the change request was only saved, but not closed, you will see a message on the Status Bar indicating that the change was updated.</td></tr>
</table>

Continued on next page

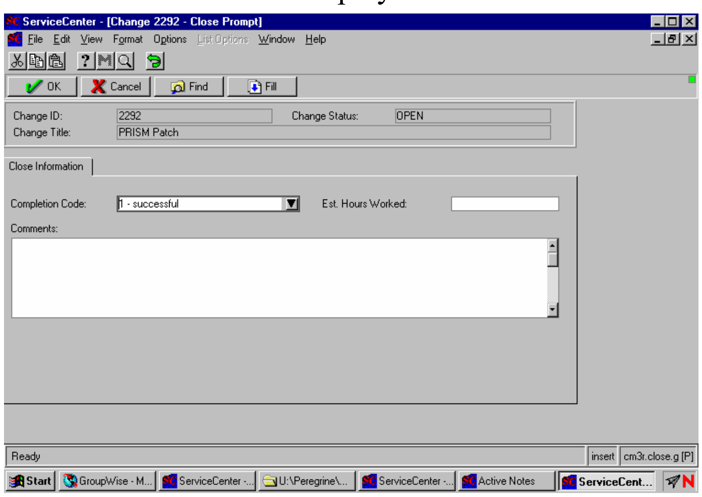
2.3 Closing a Change Request

Closing the change request

With the change request displayed (see example below), click on the **Close** button.



Result: ServiceCenter displays a close screen as shown below.

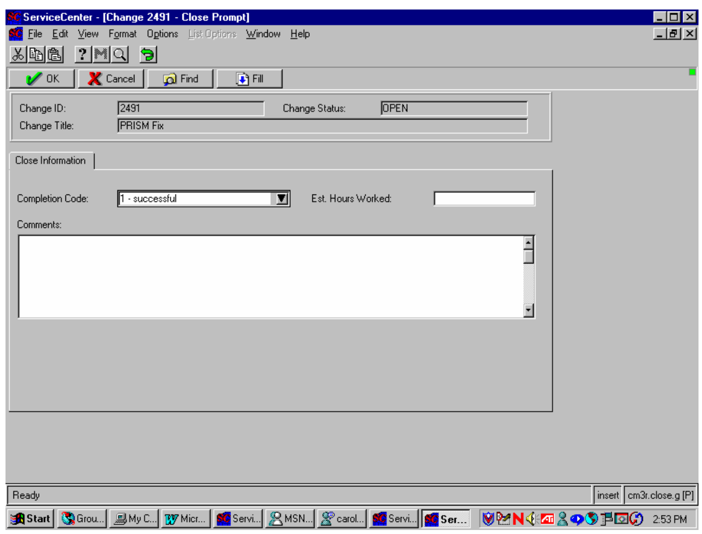


The table on the following page shows the steps necessary to close the change request.

Continued on next page

Closing the change request (continued)

Step	Action
1	If necessary, change the default **Completion Code** from *1 – successful* to *2 – successful w/ problems* or to *3 – cancelled*, if appropriate. The **Completion Code** for a change request in which the fix was not applied should be set to *3 – cancelled*.
2	Enter **Comments** as appropriate, particularly if there were problems with the implementation of the fix.
3	Click on the **OK** button. Result: ServiceCenter changes the status of the change request to *Closed* and updates the **History** tab of the change request with the name of the person closing the change (**Closed By)**, the **Date Closed, Completion Code, Est. Hours Worked** (if entered), and **Comments**.

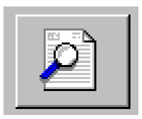


2.4 Searching Change Requests

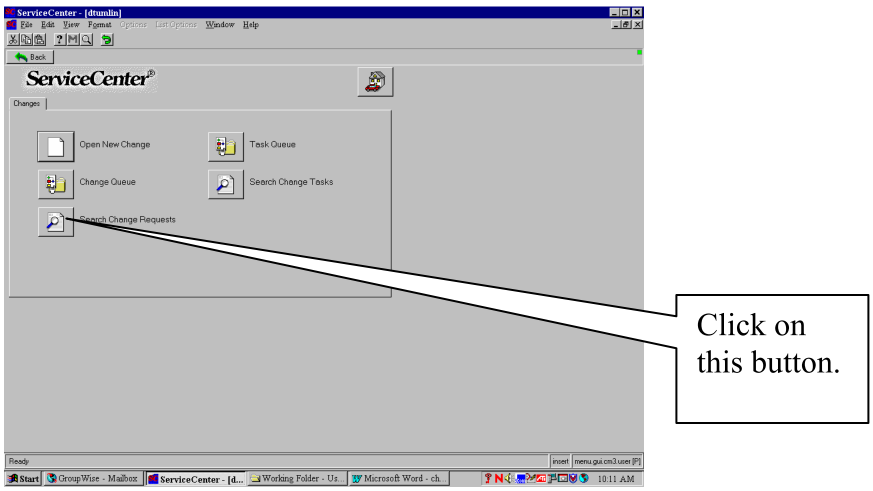
Introduction

ServiceCenter allows you to query change request records. The blocks that follow indicate how to access the search function, the fields that can be used to narrow the search to view *specific* change requests, and the procedure for searching change request records.

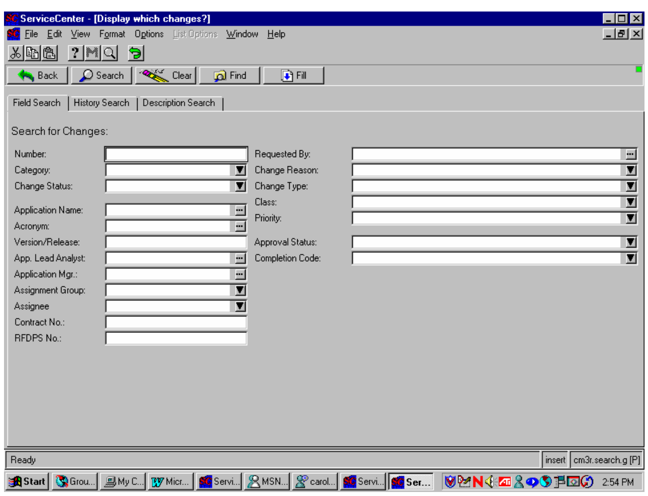
Accessing the search function



To access the search function, from the Change Management menu (see below), click on the **Search Change Requests** button.



Result: A change search form with three tabs (the **Field Search** tab, the **History Search** tab, and the **Description Search** tab) is displayed.



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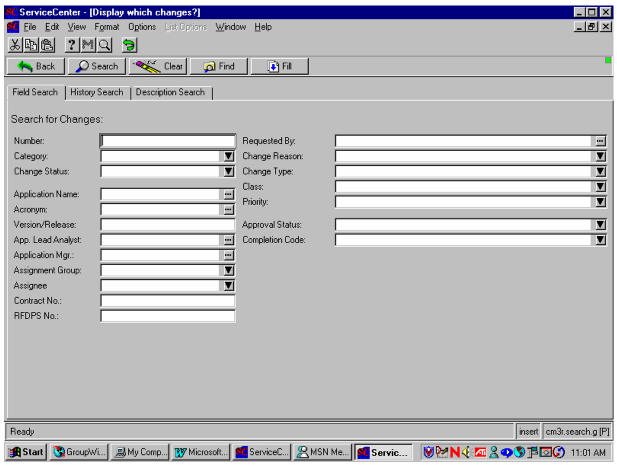
Change search form, field search tab

The Change Search Form **Field Search** tab (see below) includes the fields below, any or all of which can be left blank. These fields are used to narrow the search.



Field	Description
Number	The Change ID number assigned by ServiceCenter.
Category	The category of change request, i.e., APPLICATION, HARDWARE, NETWORK, or SOFTWARE.
Change Status	The status of the change, e.g., OPEN, IN-PROGRESS, etc.
Application Name	The application, module, system software, or COTS for which a change is requested.
Acronym	The acronym of the application or module.
Version/Release	The Fix ID of the SAMPLE fix.
App. Lead Analyst	The Lead Analyst for the application.
Application Mgr.	The Application Manager of the application.
Assignment Group	The Assignment Group assigned the change.
Assignee	The person assigned the change.
Contract No.	The contract number the change is charged to.
RFPDS No.	The RFDPS number the change is charged to.
Requested By	The name of the person requesting the change.
Change Reason	The reason for the change, e.g., CHANGE SCOPE, COST REDUCTION, LAW CHANGE, NEW REPORT, etc.
Change Type	The Change Type, e.g., PROJECT. MAINT/SUPPORT, WORK ORDER, ENTERPRISE CONTENT,CONSULTING SERVICE, etc.

Continued on next page

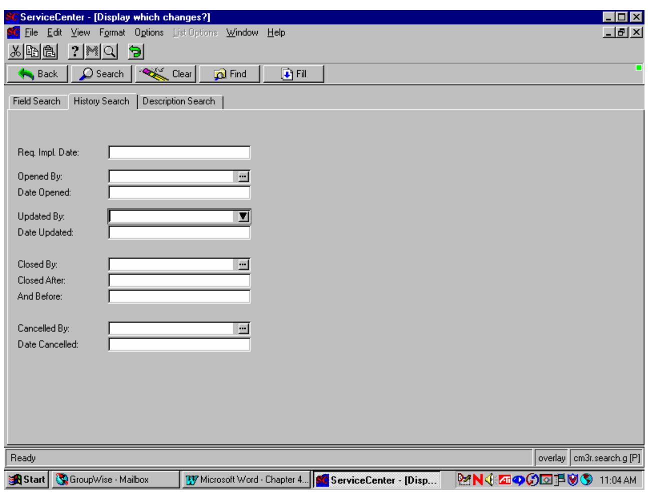
2.4 Searching Change Requests, Continued

Change search form, field search tab (continued)

Field	Description
Class	The class of change, i.e., ENHANCEMENT, MAINTENANCE, or NEW DEVELOPMENT.
Priority	The priority for the change, i.e., 1 – CRITICAL, 2 – HIGH, 3 – MEDIUM, or 4 – LOW.
Approval Status	The status of the approval, i.e., pending, approved, or disapproved.
Completion Code	The Completion Code for the change, i.e., 1 – successful, 2 – successful w/ problems, or 3 – cancelled.

Change search form, history search tab

The Search Form **History Search** tab (see below) has the following fields, any or all of which can be left blank.



Field	Description
Req. Impl. Date	The requested implementation date.
Opened By	The name of the person who opened the change request.
Date Opened	The date the change request was opened.

Continued on next page

2.4 Searching Change Requests, Continued

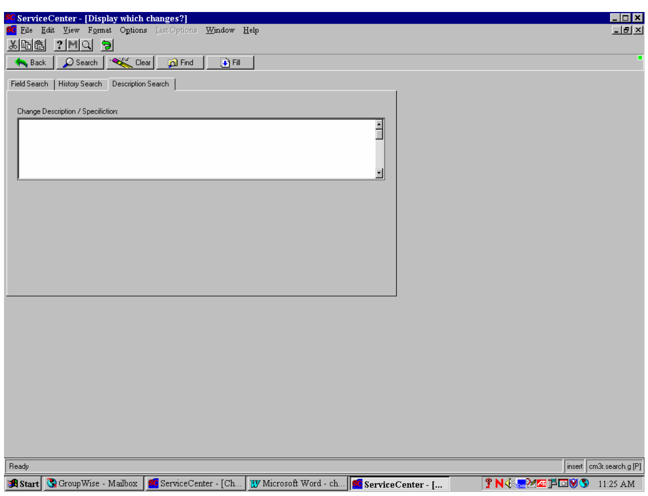
Change search form, history search tab (continued)

Field	Description
Updated By	The name of the person who updated the change request last.
Date Updated	The date the change request was updated last.
Closed By	The name of the person who closed the change request.
Closed After	The date after which the desired change request should have been closed.
And Before	The date before which the desired change request should have been closed.
Cancelled By	The name of the person who cancelled the change request.
Date Cancelled	The date the change request was cancelled.

NOTE: The format of these date fields is *mm/dd/yy hh:mm:ss*. If a time is not entered, the default is 00:00:00.

Change search form, description search tab

The Search Form **Description Search** tab (see below) displays a blank text box where you can enter a plain text query regarding the Change Description/Specification. ServiceCenter adds the plain text to the search parameters.



Continued on next page

2.4 Searching Change Requests, Continued

Change search procedure

To search change request records, follow the steps in the table below:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter any Field Search information you know on the Field Search tab of the change search form. The more information entered the narrower the search.

To fill in these fields, you can:
• type in the known information
• click on the ellipsis or Fill buttons, or press F9 to access a QBE list, or
• click on the down arrow button to access a drop-down menu, or press the down arrow key to toggle through selections from the drop-down menu.</td></tr>
<tr><td>2</td><td>Click on the History Search tab to narrow the search further. History search fields allow you to narrow the time frame for the requested date of implementation of a change as well as when the change request record was opened, updated, closed, or cancelled. These fields are independent of each other and can remain blank.</td></tr>
<tr><td>3</td><td>To narrow the search further, click on the Description Search tab and enter a plain text description of what you are searching for in the field provided.</td></tr>
<tr><td>4</td><td>Click on the Search button or press F6.

Result: One of the following will occur:

<table>
<tr><th>IF …</th><th>THEN …</th></tr>
<tr><td>there is only one record that matches the search criteria</td><td>the matching record is displayed.</td></tr>
<tr><td>multiple records match the search parameters</td><td>a QBE list is displayed, from which you can double-click on the desired record.</td></tr>
<tr><td>a message is returned stating No Records Found</td><td>eliminate some of the search parameters to broaden the search.</td></tr>
</table>
</td></tr>
</table>

2.5 Printing within Change Management

To print a QBE list

After verifying that File/Printing Options on the Menu Bar is set to *Client Printer,* follow the steps listed below to print a QBE list of changes in Change Management :

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>With a QBE list displayed, select Options➡Print.</td></tr>
<tr><td>2</td><td>Choose one of the options listed below.
<table><tr><th>IF YOU WISH TO PRINT …</th><th>THEN SELECT …</th></tr><tr><td>the QBE list itself</td><td>Print List Only.</td></tr><tr><td>a copy of each of the records in the list</td><td>Print All Records.</td></tr></table></td></tr>
<tr><td>3</td><td>Click on the OK button to send the print command to your default printer.</td></tr>
</table>

To print an individual change request record

With the individual change request record displayed:

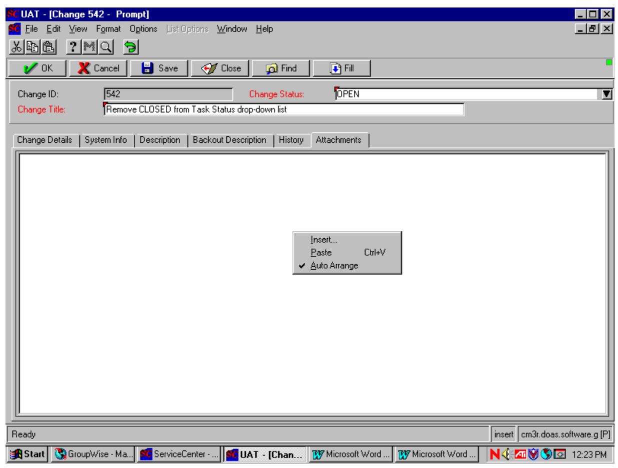
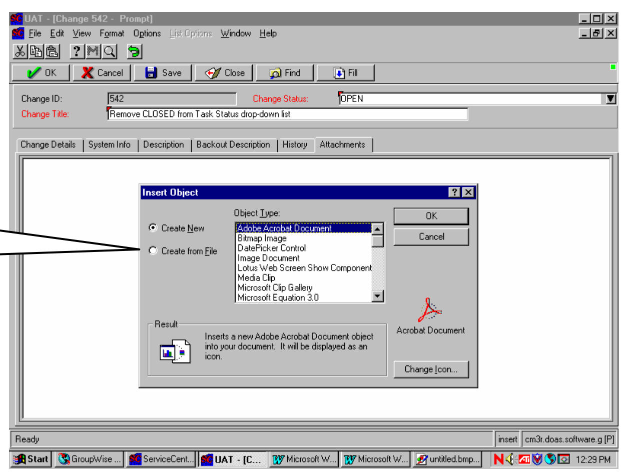
- select **Options➡Print**
- choose the option *Print Change record*, and
- click on the **OK** button to send the print command to your default printer.

NOTE: If you decide that you do not want to print after all, click on the **X** button.

2.6 Attaching Files to Change Requests

Attaching files

Files of up to 1 meg can be attached to change requests of all categories and to the **Attachment** tab of Application Category change *tasks*. The instructions in the table below describe how to add a file as an attachment.

Step	Action
1	Click on the **Attachments** tab. Using the mouse, right click in the **Attachments** text box. Result: The following screen is displayed. 
2	From the pop-up list displayed, select "*Insert …*".
3	From the screen displayed (see below), select *Create from File*. Select this option 

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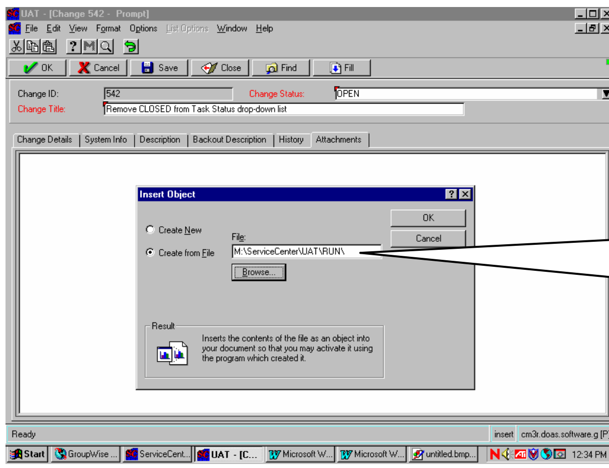
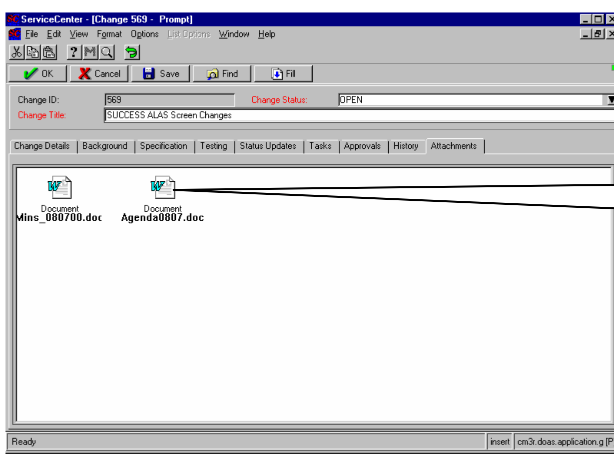
Attaching files (continued)

Step	Action
4	From the resulting screen (see below), select *"Browse ..."* and locate and insert the file you would like to attach to the change request.  Insert file name of file to be attached here
5	Click on the **OK** button.
6	Click on the **Save** button or the **OK** button. Result: The file is attached to the change request (or task) and may be opened by double clicking on it.  Double-click to open file

Section 3 Job Aid – Reports

Overview Standard or Management Reports can be obtained by following these instructions.

Step	Action
1	From the Home Screen, select the active icon for either Standard Report or Management Report i.e. whichever report type you have access to. The one that is not grayed out. If both are grayed out, contact your supervisor, so that your supervisor can request access for you from the ServiceCenter Administration Group.
2	When you are in the report area and can view the window that has a listing of reports, go to File and then select log in to server. This brings up a log-in prompt. Enter your Service Center ID and Service Center password and click OK.
3	Select the report (s) that you want from the available reports list and move them to the to be printed panel. The GaNet Traffic Group uses the report, **Changes by Assignment Group,** to prepare the weekly Traffic Reports.
4	If the report name has a "?" in front of it when you move it to the "to be printed side", then it needs parameters supplied in order to run. Double click on the name on the report, and you will be prompted to supply the needed parameters until all parameters have been supplied. For the Report Changes by Assignment Group, the first prompt is assignment group input "ganet". Second prompt is for status input either "open", "closed", or "on-hold". If closed is selected, then you will be prompted for the start and end date of the period to pull the closed changes. Click the printer button to generate the report(s).
5	When the report appears, click on the printer button again to actually print the report.

Section 4 Job Aid – Inventory Management

Maintaining Inventory

GaNet maintains its application assets in ServiceCenter using the application asset type. Authority to add or update inventory is very restricted. Contact the GaNet ServiceCenter Application Inventory Coordinator if you require changes to inventory.

Section 5 Job Aid – ServiceCenter Admin Functions

5.1 Requesting ServiceCenter Access

Overview

Supervisors should follow these instructions to request access to ServiceCenter or update access for their employees.

Step	Action
1	Complete the ServiceCenter Access form and follow the instructions on the form to request access.

5.2 Changing the Assignment Group Definitions

Overview

Assignment Groups are established to group individuals. Currently, GaNet has assignment groups: ganet/traffic, ganet/e-dev, ganet/qm, ganet/creative, and portal tier 2. New assignment groups may need to be established or changes may need to be made to the assignment group definition. A common change to the assignment group is changing the default assignee or changing the alerts.

Step	Action
1	Follow the Assignment Group Instructions in the appendix using the assignment group form provided by the ServiceCenter Administration Group. The Assignment Group Form is an Excel document. Contact the ServiceCenter Administration Group for the latest copy of the form.

5.3 Changing Your ServiceCenter Password

Step	Action
1	From the ServiceCenter Home Menu click on the Support tab. Then click on the Administration button. You will be prompted for your old password, your new password and to confirm your new password. If you have problems with your password contact GTA Desktop Support 404-657-4646

Appendix

A. Service Center Access Request Form in Outlook

B. Assignment Group Form Instructions

C. Contact List

D. Glossary

B. ServiceCenter Assignment Group Request Instructions

I. <u>Instructions for completing the Assignment Group Form</u> Form located at gta_sv02\GaNet Division\ServiceCenter \Service Center Access Forms\AssignGroupForm.

Section A – This section should be completed by departments who will use Assignment Groups for the purpose of assigning production records, such as Change Management records, for operators to work on. Operators are not notified when records are assigned to them.

Section B - This section should be completed by departments who require Alerts and Notifications to be sent when production records such as Problem tickets or Service calls, are assigned to operators.

The following information should be completed for each section, unless stated otherwise.

1. Type a name for the assignment group, on the line beside the field **Assignment Group Name**.

2. Type the name of the operators below the assignment group name (**Section A only**). Attach a ServiceCenter Request Form for each operator who currently does not have a ServiceCenter operator Id.

3. Alert Levels and Notifications (**Section B only**)
   (3a) Default Assignee (This is the person to whom all problems are assigned, unless otherwise specified).
   (3b) Select if the Default assignee should be notified by pager, email or both.
   (3c) Select the time intervals the Alerts are sent, and at what level (Extreme, High, Moderate, and Low).
   (3d) Select if the individual and the Group members should be notified by email, pager or both.
   (3e) What operators will be notified at Alert1, Alert2, Alert3, and Deadline Alert (usually the Manager).

4. Type the name of the manager of the group, the Department Manager's name, and the date the Assignment Group is requested in the designated field.

Following the completion of this form, e-mail the form to the Department Manager. The Department Manager will then e-mail the form to Todd Baker (*tbaker)*, thereby indicating approval of your request.

Field Definitions

Assignment Group - The Assignment Group name that the Alerts & Notification is being created for.

Operators – Operators who are going to be members of the Assignment Group.

Severity (Low, Moderate, High, Extreme) - The level of importance.

Default Assignee - This is the person to whom all problems are assigned unless otherwise specified.

Assignee Email - Selected if the default assignee should be notified by email.

Assignee Pager - Selected if the default assignee should be notified by pager.

Alert Intervals (Alert 1, Alert 2, Alert 3, DEADLINE): Format DDD HH:MM:SS
- Time intervals when e-mails or pages will be sent.
(ex: DEADLINE 14 00:00:00 = 14 days, Alert 1 01:00:00 = 1 Hour)

Alerts Email - Selected if the Default Individuals and/or the Default Groups should be notified by email.

Alerts Pager - Selected if the Default Individuals and/or the Default Groups should be notified by pager.

Default Individuals (Alert 1 Notify, Alert 2 Notify, Alert 3 Notify, DEADLINE Notify)
– Names of operators who will receive e-mails or pages at the Alert Interval time that corresponds to their Default Individual Alert Notify position.

Default Groups (Alert 1 Notify, Alert 2 Notify, Alert 3 Notify, DEADLINE Notify)
– Assignment groups, whose operators will receive e-mails or pages at the Alert Interval time that corresponds to the Default Group Alert Notify position.

Assignment Group Manager – The person, either a manager or a team leader, who is responsible for managing the members of the Assignment Group.

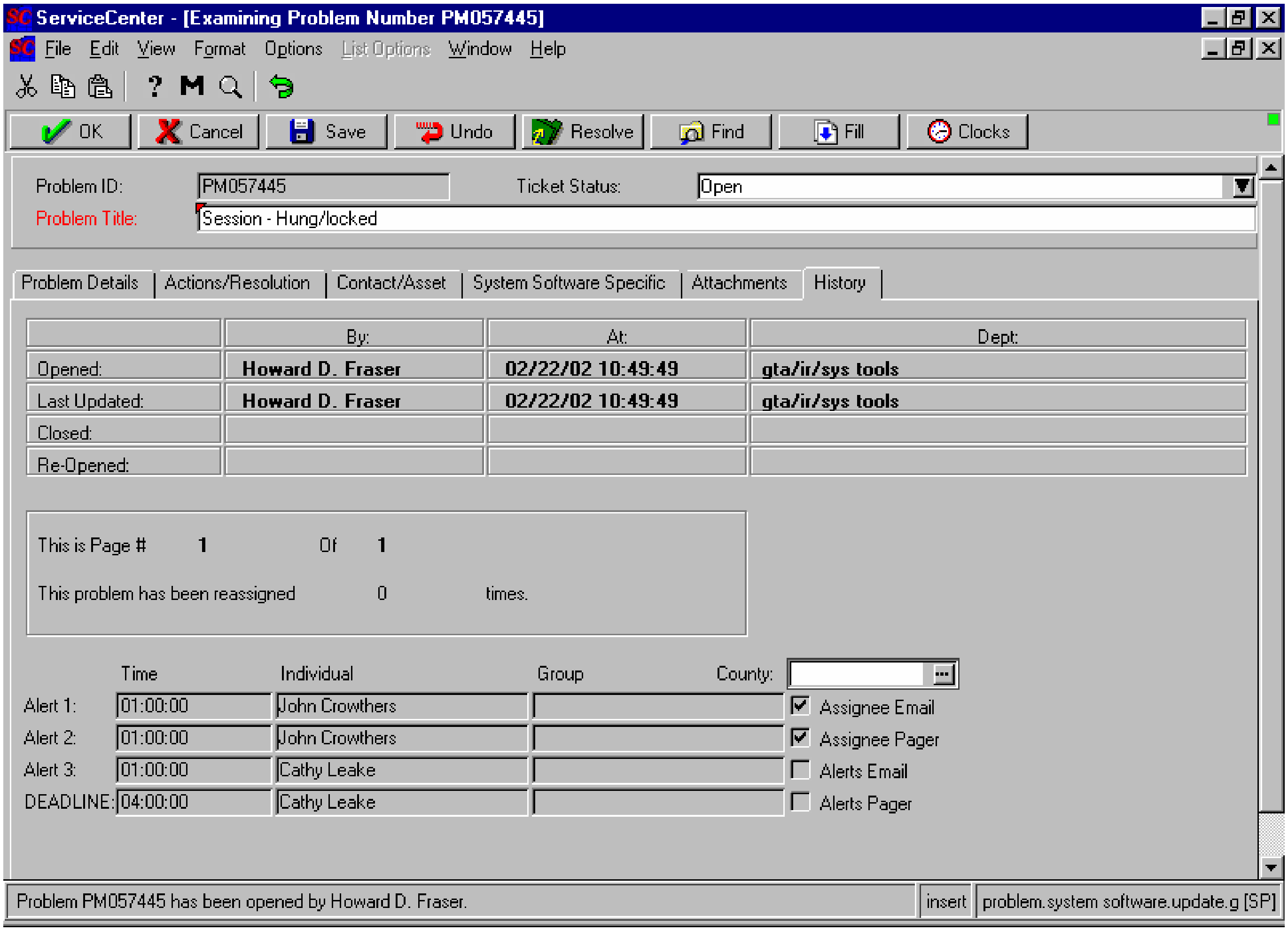
Department Manager – The department manager.

Date requested - The date the form is filled out.

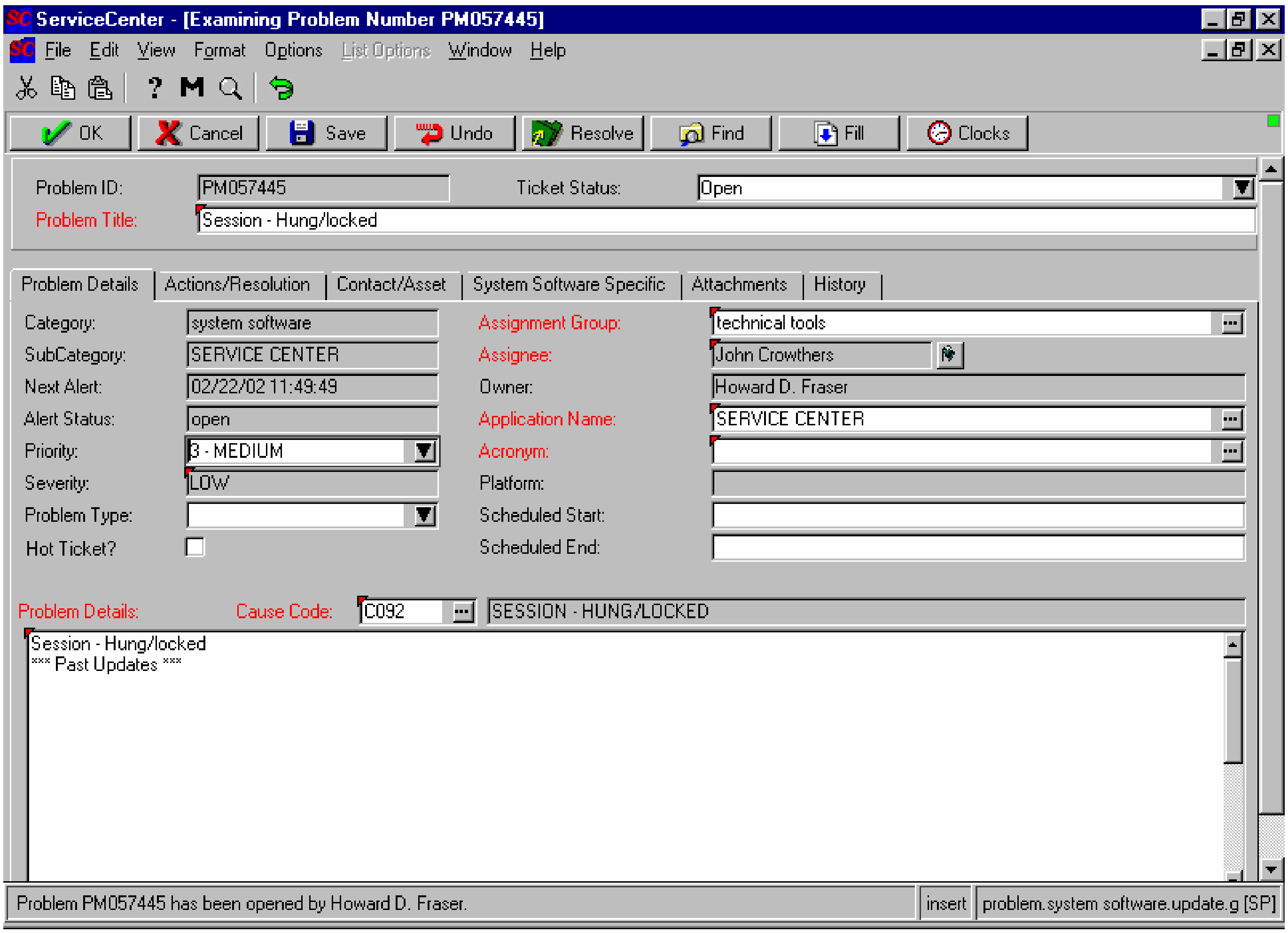
III. Calculation of Alerts & Notification times

As of 5/1/01, Alerts & Notifications are calculates as follows:
The daily clock for alerts and notifications is 8 AM – 5 PM, Monday through Friday. Alerts are not computed over the weekend. Each day has a total of 9 hours, therefore, 1 day = 9 hours, 2 days = 18 hours, 3 days = 27 hours, etc….

1. When the **Assignment Group** and **Severity** are selected, the alert time intervals appear on the **History** tab.



2. The system will take these intervals and compute the first alert and populate the **Next Alert** field, on the **Problem Details** tab. When the problem ticket is originally open, it will also calculate the **Deadline** time. Since the **Deadline** time is always the **Open** date/time plus the **Deadline** interval, the **Deadline** time is not recomputed unless the **Assignment Group** and/or **Severity** is changed. Anytime the ticket is updated the system recalculates the first alert.



Reminder

Days are calculated between the hours 8:00 AM - 5:00 PM. There are 9 hours per day.

Therefore:

9 Hours = The next day, at the same time.
18 Hours = Two days later, at the same time.
27 Hours = Three days later, at the same time.
36 Hours = Four days later, at the same time.
45 Hours = One week later, at the same time.
180 Hours = Four weeks later, at the same time.

For the ticket that was opened in this diagrams above, the alerts will compute as below:

<u>Correct configuration</u>

Time opened:	10:49 AM	
Alert 1 interval:	1 hour	11:49 AM
Alert 2 interval:	1 hours	12:49 PM
Alert 3 interval:	1 hours	01:49 PM
Deadline Alert:	4 hours	02:49 PM (Remember, each alert time is computed from the previous interval's alert time, but the **Deadline** alert time is computed from the **Open** time field.)

C. Contact List

Title	Individual	Contact Information
GTA Desktop Support		404-657-4646
GaNet ServiceCenter Application Inventory Coordinator	Geneva White	gwhite@gta.ga.gov
ServiceCenter Administration Group Manager	Todd Baker	404-463-6038
ServiceCenter Administration Group receives forms and changes, does training	Howard Baker	404-463-8126 hfraser@gta.ga.gov
ServiceCenter Administration Technical Support	Steve Collins	404-463-8131 stcollin@gta.ga.gov

D. Glossary
